

L.2.1993 - 218
C2

TOURISM 2000: A Vision for the Future

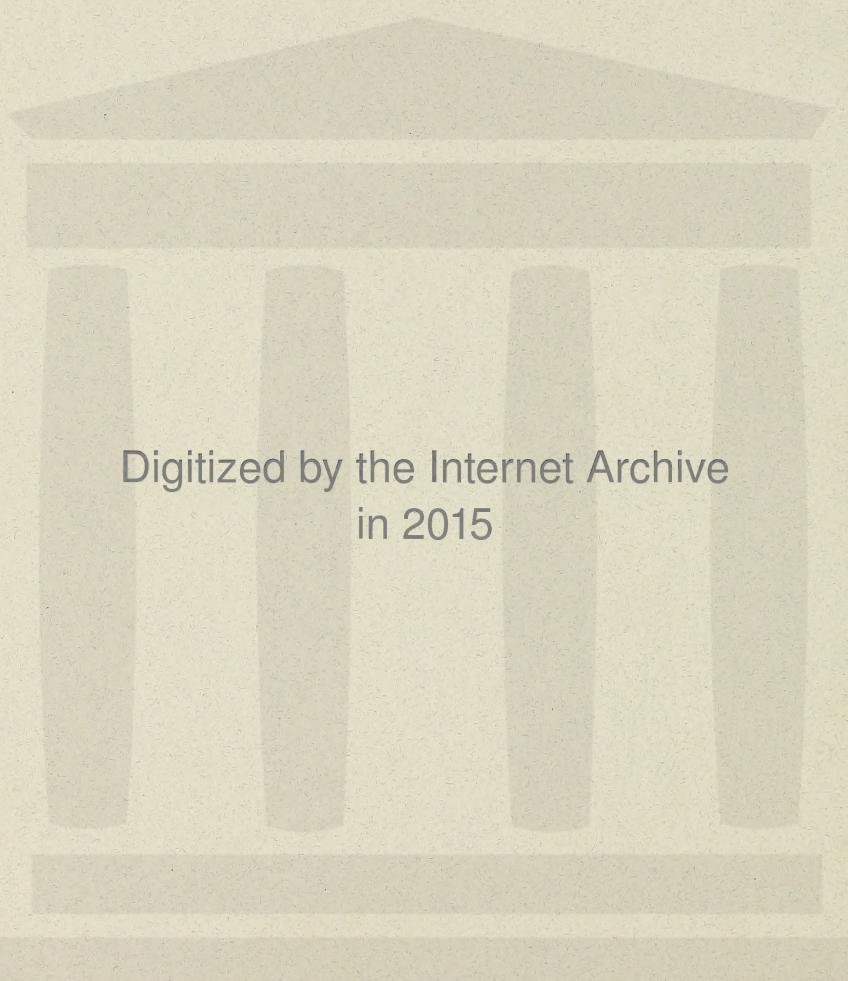
CANADIANA

MAY 11 1993

A Strategy for Tourism in Alberta

Alberta
ECONOMIC DEVELOPMENT
AND TOURISM

March 1993



Digitized by the Internet Archive
in 2015

<https://archive.org/details/tourism2000visio00albe>

MESSAGE FROM THE TOURISM ADVISORY PANEL

The Tourism Advisory Panel is pleased to present this report on a new vision and strategy for tourism to the year 2000 for Alberta.

Our tasks in preparing this strategy were threefold. First, we were required to gain a sense of where the tourism industry in Alberta currently stands from both a provincial and global perspective. We found that the industry is an important contributor to Alberta's economy and quality of life but lacks recognition and has not yet reached its potential. Secondly, we were required to determine where Albertans saw their tourism industry being by the year 2000. The vision presented in this report captures the opportunities we heard expressed for the future of tourism in Alberta. Finally, we had to identify the constraints to achieving the vision. This report introduces the challenges identified in reaching tourism's potential in Alberta and the many suggestions we heard from Albertans about how to address these challenges.

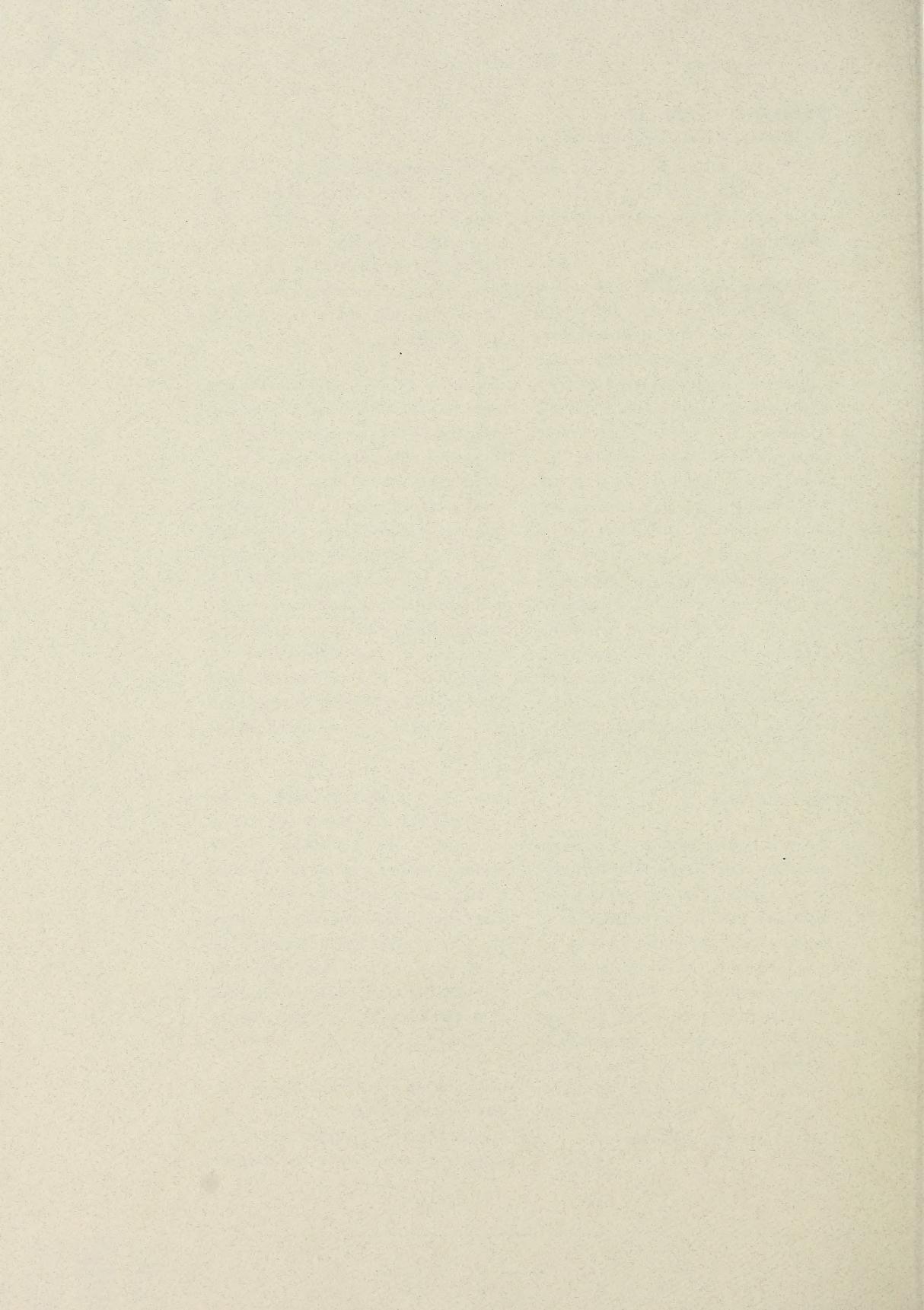
We can say with certainty that there are many who care deeply about the future role of tourism in this province and who have confidence in its potential. We feel strongly that this vision and strategy not only offer some valuable guideposts to the successful future of the industry in Alberta, but also that a successful tourism industry can contribute significantly to Alberta's overall future economic direction. The challenge is for all tourism partners to pull together to shape the future of tourism in Alberta.

Our work was primarily the result of many meetings and discussions with Albertans throughout the province. We owe sincere thanks to all those participants who shared their time, spirit and ideas through our symposiums, open houses and workshops and through written submissions.

The input we received required some interpretation. While the information provided by the participants covered a wide range of perspectives and interests, it ultimately evolved into a number of major and consistent themes. This report is designed to capture the predominant or prevailing views that were expressed on major issues. It does not detail each and every point made to the Panel by each participant. Transcripts and summaries of each symposium and regional workshop may be obtained from Alberta Economic Development and Tourism and are available on request at cost.

Given the feedback received, we are confident that this report reflects the balance, tone and intent of the information we collected. We hope that this report will add to the momentum generated during many of our meetings and will maintain the drive towards the cooperative and consultative approach to tourism's evolution in Alberta initiated by the **Tourism 2000: A Vision for the Future** process.

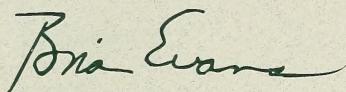
We would also like to take this opportunity to acknowledge the vision of the Honourable Don Sparrow, Minister of Economic Development and Tourism



for bringing us together as a Panel to help build this new vision of tourism in Alberta. It has been a privilege for all the Panel members to have been asked to contribute to the shaping of this most important industry in Alberta. We have

each been challenged and rewarded by the effort and hope this report can assist industry, governments and all other tourism stakeholders in their endeavours to make our industry the best that it can be.

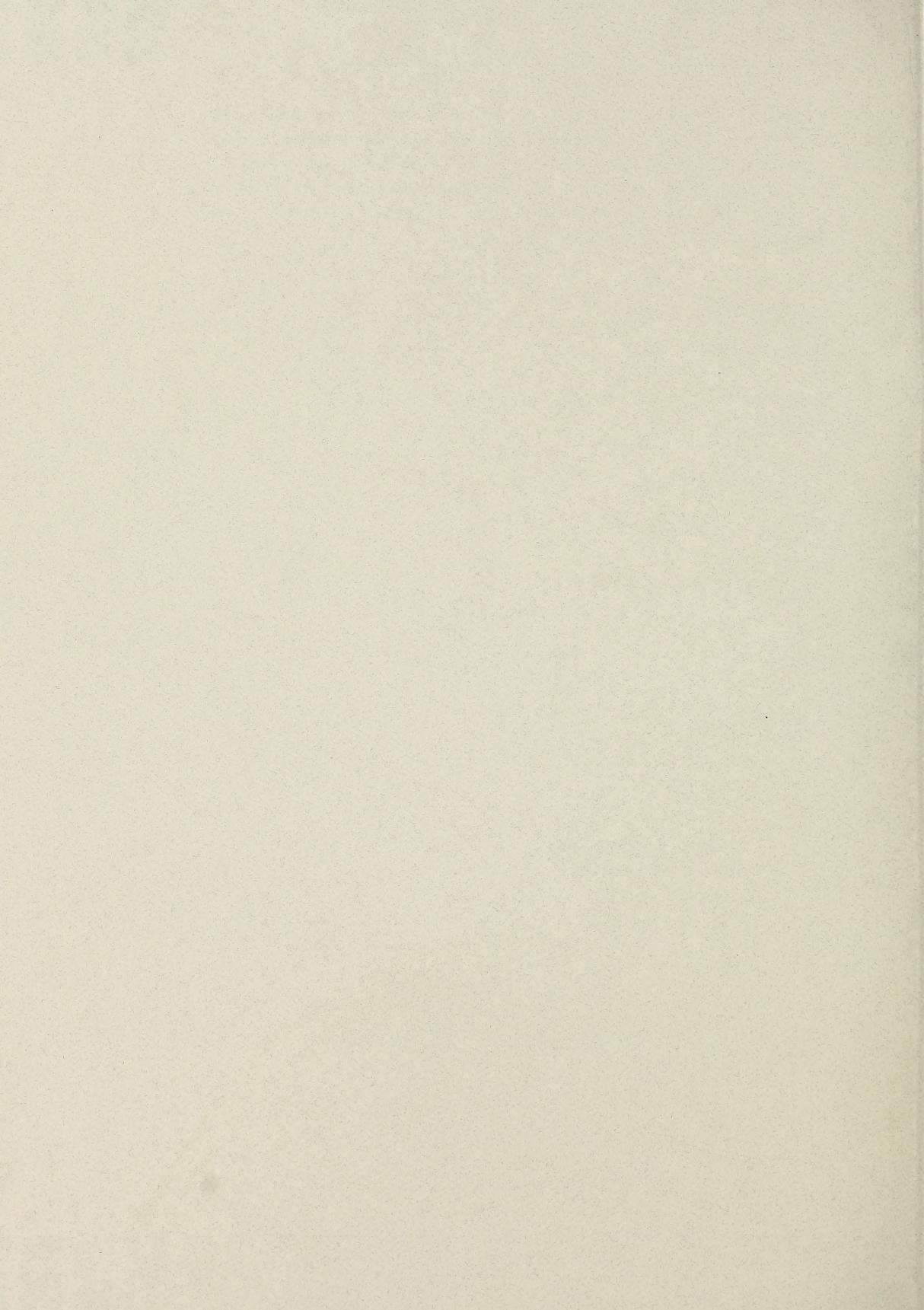
March, 1993



Brian Evans
Co-Chair



Joe Couture
Co-Chair



TOURISM 2000: A VISION FOR THE FUTURE

Table Of Contents

FOREWORD

EXECUTIVE SUMMARY

I. INTRODUCTION

II. ALBERTA'S TOURISM INDUSTRY IN PERSPECTIVE

- A. Alberta's Tourism Assets**
- B. Economic Benefits**
- C. Quality of Life**

III. A VISION FOR TOURISM

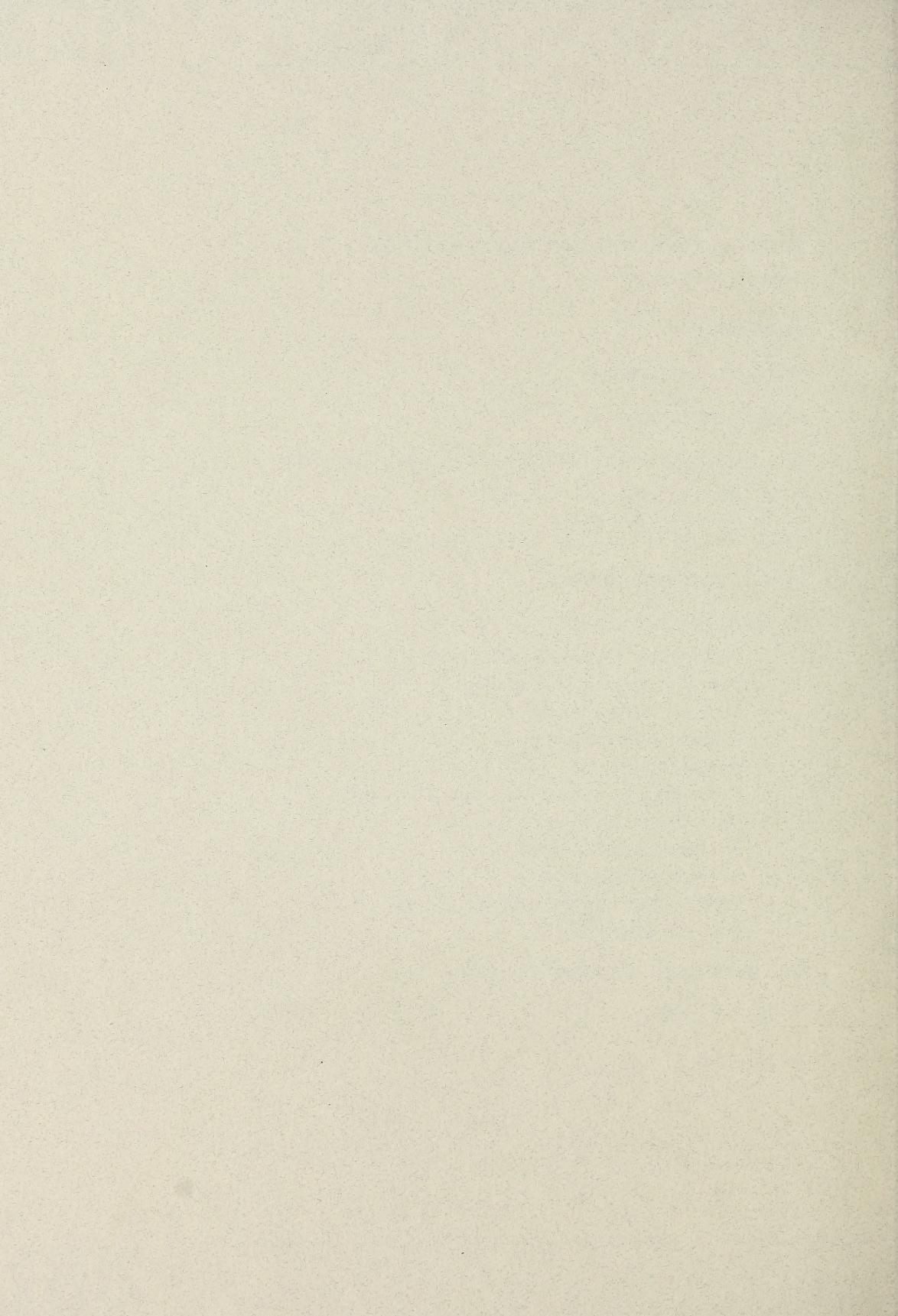
IV. TOURISM CHALLENGES

- Tourism as a Government Priority**
- Tourism and the Environment**
- Tourism Partnerships**
- Tourism Awareness**
- Human Resources**
- Creating a Positive Investment Climate**
- Regulations and Regulatory Process**
- Research and Planning**
- Tourism Infrastructure**
- Market Assessment and Marketing**
- Product Development**

V. ROLES AND RESPONSIBILITIES

VI. CONCLUSION

APPENDICES



FOREWORD

As the year 2000 approaches, traditional economic structures around the world are undergoing vast and rapid changes. Alberta is responding to these global changes by exploring new directions for economic growth and prosperity. The Toward 2000 Together project initiated by the Government of Alberta, will set in place the strategies necessary for Alberta to compete in the changing world marketplace.

New sectors are emerging to become significant contributors to national and regional economies. Tourism has become a major growth industry in the world, evolving into a sophisticated, highly competitive, global business. Tourism already employs more people than any other single industrial sector and contributes in a significant way to the economy of almost every country.

Tourism is an important economic sector in the Province of Alberta. It generates

more than \$2.61 billion in revenues annually and employs approximately 100,000 Albertans. Tourism in Alberta has made considerable gains over the past decade and its momentum should be sustained.

Tourism 2000: A Vision for the Future is an initiative designed to address the need for a provincial tourism strategy that will help the province and the industry meet the challenges of the 1990s and beyond. The vision and strategy outlined in this report provide the framework for achieving tourism's goals through a true partnership and shared responsibility among industry, government and Albertans. The result of this process will be the orderly growth of Alberta's tourism industry, while sustaining its viability and its future contribution to Alberta's economy and quality of life.

Tourism is a stable and constant contributor to Alberta's economy.

Alberta's significant natural resources provide a solid foundation for the development and marketing of our tourism products.

A strong relationship exists between tourism and many of the quality of life values widely held by Albertans.

EXECUTIVE SUMMARY

In September 1991, the Honourable Don Sparrow, Minister of Economic Development and Tourism, established the Tourism Advisory Panel to address the need for a provincial tourism strategy to help Alberta meet the challenges of the 1990s and beyond. Building on directions developed in the *1985 Position and Policy Statement on Tourism* and the *1989 Eight Point Strategy* for tourism, the Tourism Advisory Panel launched **Tourism 2000: A Vision for the Future**.

Recognizing that tourism touches many people in many different ways, Tourism 2000 involved extensive consultations with a broad cross-section of Albertans who have a stake in the future of tourism in the province. Three elements critical to any vision of tourism in Alberta became apparent during the Panel's consultations:

- Tourism is a stable and constant contributor to Alberta's economy. Tourism generated \$2.61 billion in expenditures within the Province in 1990 and employed approximately 100,000 Albertans. It has the capability to grow, to progress, mature and improve its competitive position and thus increase its contribution to the Province's economic growth.

- Alberta's significant natural resources provide a solid foundation for the development and marketing of our tourism products. Tourism has a stake in ensuring that the environmental integrity of these resources is sustained.
- A strong relationship exists between tourism and many of the quality of life values widely held by Albertans. These include such values as a vibrant economy, a healthy environment and family and community values. Properly managed, tourism can contribute to maintaining and enhancing these values.

The vision developed by tourism stakeholders addressed these three key elements:

"In the year 2000, tourism in Alberta is a dynamic industry achieving its potential as a major contributor to the economic well-being of Albertans while enhancing their quality of life and preserving the integrity of the environment."

Objectives for each of the three key areas within the vision will provide a focus in working towards achievement of the vision and in measuring our success. The objectives are:

- By the year 2000, exceed projected tourism receipts of \$4.4 billion.
- Protect Alberta's biological diversity, the integrity of its landscape and the quality of its air, water and land.
- Recognize the diversity of lifestyles in Alberta and enhance the accessibility, variety and quality of those lifestyles.

While Albertans are confident of tourism's unique capabilities to contribute positively to their future needs, they also realize that the achievement of their vision for tourism in Alberta faces several challenges. These challenges are not confined to Alberta or the tourism industry alone. They are major universal concerns affecting our competitors and partners alike. Almost without fail, all national and international tourism sectors are facing similar issues relating to: awareness and understanding of a tourism economy; financing and investment for the industry; matching products and markets; regional development and diversification; infrastructure and transportation needs; defining partners' roles and responsibilities; and environmental impacts.

Albertans identified the following major challenges which have to be addressed in order for tourism to fulfil their future economic, environmental and quality of life expectations:

Tourism as a Government Priority
– *“Profile for Action”*

Tourism and the Environment –
“*The Natural Advantage*”

Tourism Partnerships –
“*Tourism is Teamwork*”

Tourism Awareness –
“*Getting to Know Us*”

Human Resources –
“*People, Pride and Passion*”

Creating a Positive Investment Climate –
“*Invest to Grow*”

Regulations and Regulatory Process –
“*Safe and Supportive*”

Research and Planning –
“*Looking Ahead*”

Tourism Infrastructure –
“*Access Alberta*”

Market Assessment and Marketing –
“*Reaching the Customer*”

Product Development –
“*Making the Right Choice*”

Albertans also have many ideas on how to address these challenges. Strategic directions and activities for each challenge are detailed in the body of this report. Key to all the challenges, however, is the need for all stakeholders to

accept the strategic directions and assume the responsibility to implement the recommended activities. The responsibility for all the strategic directions and actions cannot be assumed by any one stakeholder alone. One stakeholder also cannot continually assume all the roles necessary to implement all the strategic directions and actions. The degree of responsibility and the roles adopted by the various tourism stakeholders will vary over time as challenges are addressed and their priorities shift. Each of the tourism stakeholders will take on, individually and collectively, various roles in relation to the degree of responsibility adopted. It is the willingness of the stakeholders to assume their responsibility towards specific strategic directions and play the most appropriate role that will determine tourism's success in meeting its challenges.

It is the willingness of the stakeholders to assume their responsibility towards specific strategic directions and play the most appropriate role that will determine tourism's success in meeting its challenges.

The most overriding theme arising from Tourism 2000 is the strength of the common belief shared by all the stakeholders that tourism is a viable force for economic, social and environmental development in the Province of Alberta. This belief is based on several fundamental principles – principles such as partnership, environmental integrity, sustainability, fiscal responsibility and equality of opportunity. It is these broadly held principles that will drive and assist all tourism stakeholders in assuming the appropriate roles and responsibilities to implement the strategic directions and achieve the vision for tourism in Alberta in the year 2000.

The development of a vision and strategy for tourism in the province required an intensive and far-reaching process for generating input.

1. INTRODUCTION

In 1985, the *Position and Policy Statement on Tourism* responded to the Government of Alberta's *White Paper on an Industrial and Science Strategy for Albertans*. This government document outlined the policies necessary to ensure successful growth of Alberta's tourism industry.

In 1989, Alberta Tourism, in conjunction with the tourism industry, developed and implemented an eight-point strategy to strengthen tourism's contribution to the Alberta economy (see Appendix A). The strategy is designed to capitalize on the growing world-wide importance of tourism and our many provincial economic opportunities.

The Eight Point Strategy provided a blueprint for the development of tourism in Alberta and laid the foundation for **Tourism 2000: A Vision for the Future**. Building upon the eight points, Tourism 2000 lays out the strategic directions necessary for tourism to contribute to a stable provincial economy, to compete globally, and to contribute to Alberta's quality of life in the year 2000.

In order to assist the preparation of Tourism 2000, a Tourism Advisory Panel was established by the Honourable Don Sparrow, Minister of Economic Development and Tourism. The Panel represented a wide range of interests including those from the tourism industry, non-governmental organizations, other interested stakeholder groups, and government. The Panel's role was to:

- serve as a focal point for generating input from industry, interest groups and individuals through industry symposiums, regional workshops, open houses and written submissions;
- act as a "steering committee" for reviewing, providing input to, and guiding the development of a tourism strategy for the province;
- advise and make recommendations to the Minister of Economic Development and Tourism on the development of long-term goals, objectives and strategies for tourism in Alberta.

The development of a vision and strategy for tourism in the province required an intensive and far-reaching process for generating input. It was necessary that a broad range of industry, interest groups and individuals were provided with the opportunity to contribute their ideas and thoughts on the future of tourism in Alberta.

Tourism 2000 was publicly launched in September, 1991. A discussion package, consisting of background information, anticipated issues and an outline of the process, was made available to the industry and the public to stimulate participation. The process for developing the tourism strategy for the province had three broad phases:

PHASE I. **Tourism Partner Input**

Comments, concerns and opinions regarding tourism in Alberta were solicited from a broad base of Albertans between October 1991 and January 1992. Input was collected in several ways.

- Symposium #1: Tourism partners, from industry and tourism-related sectors, were invited to participate in a province-wide symposium in Calgary on October 9, 1991. The overall purpose was to promote and generate discussion among participants, identify issues, and explore potential future directions for tourism in Alberta.
- Industry/Regional Workshops: A series of ten regional workshops in locations throughout the province provided regionally-based operators, organizations and interested individuals an opportunity to

contribute their thoughts and ideas on the future of tourism in Alberta. Over 450 Albertans participated in the workshops. An additional workshop was also held with senior government officials representing a majority of provincial government departments and agencies.

- Public Open Houses: The general public was encouraged to participate through ten open houses which were held in conjunction with the workshops. Advertisements were placed in local newspapers and press releases were sent to local media.
- Public Submissions: Participants from the symposium, workshops, open houses and the general public were also encouraged to submit written briefs. This was done through verbal announcements at the symposium and workshops; advertisements in daily newspapers throughout the province and in locations where workshops were held; and mailouts to both out-of-province and in-province organizations. One hundred and five written submissions were received and reviewed by the Panel.
- Tourism Impact Monitoring Survey (TIMS): A separate survey sampled 1,800 Albertans about their attitudes and opinions towards tourism in the province. The survey provided insights into a number of tourism-related issues from the broader perspective of the public in general. The results of the survey were made available to the Tourism Advisory Panel.

PHASE II. *Evaluation of Input*

The second phase of the process involved a review and examination of the input collected, an assessment of concerns and issues, and the establishment of the final "data base".

The results of Phase II provided, in summary form, the key comments and findings of the contributions received during the consultation phase. From the range of ideas presented, tourism themes were identified and defined, a draft vision for tourism developed and preliminary goals and strategic directions proposed. These were presented at Symposium #2 held March 26, 1992 in Edmonton. Symposium participants provided valuable feedback.

Over 450 Albertans participated in the workshops.

PHASE III. *Strategy Development*

Phase III began the actual development of the tourism strategy. It was guided by several criteria. Criteria for the strategy were: it must reflect the goals and objectives that were heard from the tourism community; it must articulate the tourism vision and present the strategic directions and activities in a meaningful way; and it should motivate tourism partners to define and develop their own strategies, roles and responsibilities within the broad Tourism 2000 context.

The results of Phase III culminated in the vision, objectives and strategic directions outlined in this report.

Those Albertans who participated in the Tourism 2000 process spoke with pride and commitment about the qualities and benefits of their local areas and attractions.

...our natural beauty and scenic assets set a world-class stage for the enjoyment of many popular vacation and recreational activities.

Further complementing Alberta's natural beauty and scenery are the province's cultural and historical resources.

II. ALBERTA'S TOURISM INDUSTRY IN PERSPECTIVE

In fulfilling the initial task of gaining a sense of tourism's current position in Alberta, the Panel found that the province possesses a significant variety and quality of tourism assets. These assets are capable of continuing to provide a major contribution to the province's economy and the overall quality of life enjoyed by Albertans. Those Albertans who participated in the Tourism 2000 process spoke with pride and commitment about the qualities and benefits of their local areas and attractions.

A. Alberta's Tourism Assets

The tourism industry in Alberta is built on the province's natural and human resource assets.

While the Rocky Mountains are the predominant natural resource-based asset, other aspects of Alberta's natural beauty and scenery found throughout the province have considerable potential. Alberta's open spaces, badlands, lakes, forests, prairies and rivers provide many diverse scenic experiences. These advantages are complemented by Alberta's fish and wildlife resources and are also reinforced by the relative abundance of undeveloped natural resources and land that is suitable for tourism purposes.

The wealth of our natural beauty and scenic assets sets a world-class stage for the enjoyment of many popular vacation and recreational activities. The province's tourism industry partners have developed some of the most challenging, exciting and accessible recreational attractions and services in the world. This system includes our national, provincial and urban parks; downhill and cross-country ski areas; skating, golfing, cycling and swimming facilities; and adventure products and services such as trail riding, river rafting, wildlife viewing and guiding for hunting and fishing.

Further complementing Alberta's natural beauty and scenery are the province's cultural and historical resources. Alberta has developed a number of historical attractions, some with international stature. This network of attractions, such as the Royal Tyrrell Museum of Palaeontology, Head-Smashed-In Buffalo Jump, Reynolds-Alberta Museum, Remington-Alberta Carriage Centre and the Western Heritage Centre, is continuing to grow and, with their associated interpretive services, provides an important dimension to visitor activities.

Cultural and heritage visitor activities are not limited to historic attractions. Alberta has a diverse range of experiences generated by Alberta's multicultural mosaic and vibrant arts community. Alberta hosts a number of successful festivals and events annually, some of which have national and international exposure and provide visitors with value-added opportunities when visiting the province.

Special interest experiences are also provided by some of the province's natural and human history and economic development themes. Themes such as coal mining, oil sands, forestry, agriculture and transportation hold a certain fascination for residents and non-residents alike. Western and native heritage and the province's European settlement are themes that are highly significant and have great potential. While some specific components have been developed, these areas remain as future opportunities throughout many regions of the province.

The growing maturity of the province's tourism industry continues to be supported by an increasingly sophisticated level of existing facilities and services. The province's

accommodation and dining facilities, entertainment and shopping have evolved to a level that made possible the successful staging of such world-class events as the 1988 Olympic Winter Games.

The province's tourism industry is supported by a network of infrastructure and services that are an inherent part of visitors' enjoyment when travelling to and within the province. These include information and communication services, a modern highway and airport network, scheduled airline and bus services, a modern utility infrastructure and services that offer visitors a comforting degree of safety and security.

Alberta's metropolitan and urban areas are further examples of the growing network of support services and infrastructure to Alberta's tourism industry and have also evolved to desirable and attractive destinations in their own right. The continued development and promotion of convention and meeting facilities have enhanced this reputation. Through the capable hosting of conferences, symposia, conventions and trade shows, Alberta's large urban tourism infrastructure can and will continue to enhance the province's future as a centre for knowledge exchange.

Urban attractions also contribute to the recreation and leisure product available in Alberta. West Edmonton Mall, the Calgary Zoo and the Edmonton Space and Science Centre are just a few examples of the visitor attractions within our province. Year after year, major events such as the Calgary Stampede and Edmonton Klondike Days host visitors from near and far.

The residents of Alberta are also one of the province's major tourism assets. Albertans contribute to a vibrant volunteer sector that supports many of our cultural and heritage resources providing enjoyment for residents and

visitors alike, and improving our overall quality of life. Albertans are open, friendly and hospitable, and visitors genuinely enjoy interacting with our residents as demonstrated during the 1988 Olympic Winter Games in Calgary.

Albertans are accepting of visitors from all over the world. The delivery of quality service has received increasing emphasis with the current focus on professionalism and development of human resources. The province's tourism industry has responded by improving its hospitality and training standards and generating the appropriate awareness of tourism as a beneficial industry. The hospitality spirit is also supported by the network of information services that reduce the barriers that visitors face when making a destination choice or travelling within the province.

Alberta truly possesses an abundance of high quality tourism assets which contribute to a strong tourism industry.

B. Economic Benefits

Tourism in Alberta already represents a stable source of revenue within the province. A growing proportion of this revenue comes from non-resident visitors. These expenditures contribute significantly to Alberta's export trade. Tourism expenditures by both resident and non-resident visitors combine to sustain a substantial number of jobs for Albertans.

Alberta's tourism industry generated \$2.61 billion in expenditures within the province in 1990. These expenditures represented approximately 3.6 per cent of Alberta's gross domestic product. Tourism in Alberta is a dependable contributor to the province's economy. During the period 1982-1990, tourism consistently contributed between three to four per cent of Alberta's annual gross domestic product in spite of major economic shocks and price instability in resource commodities.

The residents of Alberta are also one of the province's major tourism assets.

Alberta's tourism industry generated \$2.61 billion in expenditures within the province in 1990.

Tourism is the fastest growing industry in the world.

Tourism is a labour-intensive industry.

Tourism expenditures in Alberta between 1982 and 1990 have also experienced constant, real growth. In terms of real growth, the tourism industry in 1990 is almost one-fifth larger than it was in 1982.

The prospects for tourism's continued contribution to Alberta's economy over the next ten years are considered excellent. Tourism is the fastest growing industry in the world. Alberta, as a tourism destination, has a number of comparative advantages over other competitive tourism destinations in the world. These include our internationally-renowned natural and scenic resources and the diversity of our other natural assets. Based on a recent survey of residents, the majority of Albertans believe the province has room for the development of more tourism capacity.

Tourism in Alberta offers several advantages in contributing to the further development of the province's economy. As a renewable and sustainable industry, tourism can provide expanded choices for the future use of natural resources such as forests, mountains, wetlands and our scenic beauty. Existing tourism assets already provide an excellent foundation. In fact, significant growth may be achievable by simply using existing assets more effectively through greater integration, coordination and cooperation.

Tourism is a labour-intensive industry. Tourism expenditures create a wide range of career choices for Albertans. In 1990, Alberta's tourism industry employed approximately 100,000 Albertans, generating an estimated 72,200 person-

Figure 1
Tourism is a Steady and Proven Contributor to Alberta's Economy
(Billions of \$)

Year	Gross Domestic Product	Tourism Receipts	% of GDP
1982	\$ 53.7	\$ 1.65	3.1
1983	55.2	1.72	3.1
1984	59.3	1.80	3.0
1985	63.5	1.90	3.0
1986	56.5	2.09	3.7
1987	59.0	2.14	3.6
1988	63.4	2.41	3.8
1989	67.4	2.50	3.7
1990	72.9	2.61	3.6

Figure 2
Tourism Experiences Real Growth
(Billions of \$)

Year	Tourism Receipts (Current \$)	Year-to-Year Growth %	Tourism Receipts (Constant \$1990)	Year-to-Year Growth %
1982	1.65	—	2.21	—
1983	1.72	4.2	2.21	(0.3)
1984	1.80	4.7	2.25	2.1
1985	1.90	5.6	2.31	2.6
1986	2.09	10.0	2.46	6.3
1987	2.14	2.4	2.42	(1.3)
1988	2.41	12.6	2.66	9.6
1989	2.50	3.7	2.66	(0.1)
1990	2.61	4.4	2.61	(1.9)
% 82/90	58.2%	6.0%	18.1%	2.1%

years of employment. Employment in tourism is well represented across Alberta and demonstrates the industry's potential to contribute to many regions of the province.

Figure 3

Tourism Employment is Distributed Across Alberta (1990)

Tourist Zone	Employment (Person-Years)
1. Chinook Country	4,398
2. Gateway	2,575
3. Big Country	836
4. David Thompson	3,872
5. Battle River	2,749
6. Lakeland	3,640
7. Evergreen	1,440
8. Mighty Peace	1,430
9. Jasper National Park	2,969
10. Calgary & District	19,264
11. Edmonton	19,267
12. Banff National Park	6,470
13. Game Country	1,325
14. Midnight Twilight	2,065
TOTAL	72,200

Like many other industries, tourism relies on the quality training of its labour force for its successes. Through the Alberta Tourism Education Council, tourism is already establishing the partnerships and strategic alliances between employers, educators, employees and potential employees required to address the continued training needs of the industry.

Tourism expenditures in Alberta are distributed among a variety of enterprises. At the heart of Alberta's tourism industry, there are many businesses, organizations and facilities satisfying the needs of travellers throughout the province. These enterprises provide products and services such as transportation; accommodation; meals and refreshments; recreation, education and entertainment; tour and travel arrangements; and retail goods and souvenirs. Many of Alberta's large and small business enterprises derive at least some portion of their receipts from tourism activities. Furthermore, increased tourism activities directly support traditional Alberta industries by

purchasing products from other sectors such as agriculture, energy, manufacturing and other service industries. In 1990, over \$1.3 billion in tourism expenditures from out-of-province tourists in Alberta were shared among the wide variety of enterprises serving tourists.

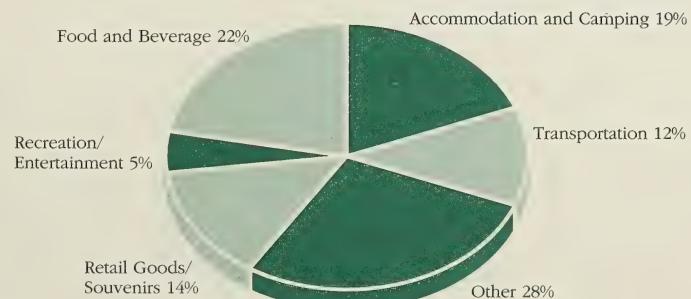
Tourism expenditures in Alberta are distributed among a variety of enterprises.

Many of Alberta's large and small business enterprises derive at least some portion of their receipts from tourism activities.

In 1990, approximately \$611 million or almost one-quarter of the province's total tourism revenue was generated by visitors from outside of Canada.

Figure 4

\$1.3 Billion From Out-of-Province to Alberta Enterprises



Source: 1990 Alberta Non-Resident Travel Exit Survey

One of the key strengths of Alberta's tourism industry is its relative stability in times of uncertainty.

Properly developed, tourism can often bridge the need for income and jobs and the concern for the environment.

organization and management of world-class events, the development of hospitality standards, certification and community-based initiatives are some examples where Alberta's tourism industry has exported its tourism knowledge base. Tourism also improves Alberta's image and reputation abroad, thus promoting and expanding export trade in our traditional resources.

One of the key strengths of Alberta's tourism industry is its relative stability in times of uncertainty. A large measure of this stability is derived from the range of complementary markets served by Alberta's tourism offerings. The tourism experiences available in Alberta appeal to many markets. The industry remains extremely resilient through its growing ability to respond to the quickening pace of change characterizing the world today.

Demand for Alberta's tourism experiences is both local and global. In 1990, travel to and within Alberta resulted in an estimated 13.2 million person-trips of at least one night or more. These trips generated approximately \$2.61 billion in tourism receipts for the province. Albertans generated 72.5 per cent of the 1990 person-trips and almost 50 per cent

of the tourism receipts. Non-Albertans represented 27.5 per cent of the person-trips and the remaining 50 per cent of tourism receipts.

The overall significance of tourism to Alberta's economy in terms of income, jobs and trade is further enhanced by the fact that tourism is characterized by a higher value-added component than many other industries. Tourism provides a relatively wide spread between the cost of inputs and the prices received for its outputs. The result is a higher than normal economic impact. Tourism's economic impact on Alberta including indirect revenues and job creation was approximately \$4.1 billion in 1990. The industry also generated approximately \$635 million in tax revenue for all levels of government during 1990.

C. Quality of Life

Alberta's tourism industry not only benefits the residents of this province in economic terms. The quality of life enjoyed by Albertans throughout the province is also enhanced through a thoughtful and carefully planned and managed industry.

Visitors from outside a local community need and demand a wide range of facilities and services. Albertans also benefit from these amenities. From this perspective, the tourism industry provides Albertans a greater range of opportunities in public facilities, recreation, accommodation, entertainment, and shopping than would otherwise be supported by the local community's financial capacity and needs alone.

Additional quality of life considerations are becoming more apparent in today's era of dwindling natural resources. Alberta's natural assets are becoming an increasingly valued commodity. Properly developed, tourism can often bridge the need for income and jobs and the concern for the environment. Tourism can offer choices which can integrate the needs of

Figure 5
Tourism is an Important Source of Export Earnings For Alberta
(Total 1990 Exports \$17.2 Billion)



Source: Alberta Bureau of Statistics

the environment and the needs of the economy in a sustainable and acceptable fashion.

Tourism also acts as an effective tool for regional economic growth. The traditional economic base of many rural communities is changing. Tourism offers an economic alternative for those communities willing to work together to create viable tourism attractions based on their local attributes.

Tourism contributes to making Alberta a better place to live in many other ways that are just as significant as creating employment, income or trade opportunities. Tourism offers Albertans a window to the world as well as a

window to themselves. The quality of life enjoyed by Albertans is largely defined by their relationships with each other and their relationships with their surroundings. For Albertans, this includes their social and cultural make-up and history as well as the more natural or physical attributes. Albertans throughout the province celebrate the relationships between themselves and their environs in a multitude of ways including local festivals, fairs and events; the support of parks, natural areas, wilderness areas, ecological reserves, recreational facilities and sporting opportunities; and the interpretation and display of our history and ways of life. Through tourism, Albertans' lives are enriched.

Tourism also acts as an effective tool for regional economic growth.

Figure 6

**Tourism in Alberta Serves a Diverse Number of Markets
(1990 Figures)**

Origin	Person-Trips (One + Nights)		Tourism Receipts ('000's)	
		%		%
Albertans	9,605,770	72.5	\$ 1,290,000	49.3
Other Canadians	2,380,600	18.0	713,000	27.3
U.S.A.	830,800	6.3	324,000	12.4
Other International	431,400	3.2	287,000	11.0
TOTAL	13,248,570	100.0	\$ 2,614,000	100.0

Source: 1990 Alberta Non-Resident Travel Exit Survey

III. A VISION FOR TOURISM

Tourism, export tourism – we may call it import tourism from people coming from all over the world to Alberta – is creating wealth, new wealth. It does not circulate only existing dollars. We have to create new wealth.

Alberta has significant natural resources that provide a solid foundation for the development and marketing of our tourism products.

Throughout the public consultation process, Albertans discussed and offered many diverse comments related to their vision of tourism for Alberta in the year 2000. The comments encompassed several elements that attempted to capture the essence of Alberta: its people; culture; social fabric; natural assets and environmental quality; and the desire to retain these elements within a vibrant and economically beneficial tourism industry structure.

In total, 20 elements were identified. A vision was constructed using these elements as the foundation.

The vision for tourism reflects three key areas, namely, economic contribution, environmental integrity and quality of life, consistently voiced by Tourism 2000 participants:

- Tourism is a stable and constant contributor to Alberta's economy. It has the capability to be a growth industry – being able to progress, mature and improve its competitive position. Increased and enhanced job opportunities in tourism can contribute to economic growth.

"...it has to be some type of economic driving force. Because if you're not deriving economic benefit, then you're hardly going to sustain yourself over time."
(Participant at Calgary Symposium)

"Tourism, export tourism – we may call it import tourism from people coming from all over the world to Alberta – is creating wealth, new wealth. It does not circulate only existing dollars. We have to create new wealth." (Participant at Edmonton Workshop)

- Alberta has significant natural resources that provide a solid foundation for the development and marketing of our tourism products. Tourism has a stake in ensuring that the environmental integrity of these resources is sustained.

"Environmentally sensitive. Like I said, we can have the best of both worlds. I believe we can build on the mistakes of the past. We're in a unique position in Alberta. We've got some of the very last of the untouched country in North America." (Participant at Peace River Workshop)

"...distinct advantage, to me the distinct advantages are product. We have a clean, wild and pristine natural environment. That's our advantage. That's the thing we've got to market in Alberta."
(Participant at Canmore Workshop)

"...Alberta; the last gentle wilderness, because people are looking for wilderness experiences, but they don't want them to be too wild. And the other statement was, great experiences for those with great expectations." (Participant at Canmore Workshop)

- A strong relationship exists between tourism and many quality of life values that are widely held by Albertans. These include such values as a vibrant economy, a healthy environment, and family and community values. Properly managed, tourism can contribute to maintaining and enhancing these values.

"...it's very important to get not only a physical balance in the community but also a social balance in the community." (Participant at Jasper Workshop)

"...local participatory community commitment. And we're talking grassroots. We had difficulty defining how small or large we were talking about this community to be. Some thought it could apply

equally to Calgary as it could to the whole province." (Participant at Calgary Workshop)

The vision recognizes the forces that shape its attainment such as the resources and skills required, the competitive environment in which it functions and the challenges that face the industry. It provides tourism industry stakeholders with a sense of purpose as they strive for a common future.

...it's very important to get not only a physical balance in the community but also a social balance in the community.

Vision

"In the year 2000, tourism in Alberta is a dynamic industry achieving its potential as a major contributor to the economic well-being of Albertans while enhancing their quality of life and preserving the integrity of the environment."

The vision paints a picture of where we want to be, but not necessarily how we will get there. Developing objectives for the three key areas within the vision provides focus in working towards its achievement. The following objectives are based on the three key areas of

economic contribution, environmental integrity and quality of life and were used to identify future strategic directions and activities. These objectives can also be used to measure our success in reaching the vision.

Objectives

- By the year 2000, exceed projected tourism receipts of \$4.4 billion.*
- Protect Alberta's biological diversity, the integrity of its landscape and the quality of its air, water and land.
- Recognize the diversity of lifestyles in Alberta and to enhance the accessibility, variety and quality of those lifestyles.

* The projection of \$4.4 billion in tourism receipts is based on two growth scenarios developed from Alberta Tourism's Tourism Economic Impact Model, the 1990 Alberta Non-Resident Travel Exit Survey and the 1991 Alberta Resident Travel Survey. The scenarios for increasing total receipts are outlined in Appendix B.

IV. TOURISM CHALLENGES

The assets and potential to enhance our competitive position in the tourism marketplace exists in Alberta. Tourism stakeholders must use our comparative advantages to build Alberta's tourism industry.

As we move through the last decade of the century and quickly approach the year 2000, tourism in Alberta is challenged by a number of complex and interrelated issues. Many of these issues and challenges were identified and discussed during the consultation process.

These challenges are not confined to Alberta. They are, in fact, universal concerns affecting our competitors and partners alike. Almost without fail, all national and international tourism sectors are facing similar issues relating to: awareness and understanding of a tourism economy; financing and investment for the industry; matching products and markets; regional development and diversification; infrastructure and transportation needs; defining partners' roles and responsibilities; and environmental impacts.

Tourism is maturing rapidly in this province. A number of positive steps have already been taken to meet these various challenges. Tourism stakeholders must continue to be proactive in addressing the issues. The assets and potential to enhance our competitive position in the tourism marketplace exists in Alberta. Tourism stakeholders must use our comparative advantages to build Alberta's tourism industry. It is how we respond to these challenges that will determine the measure of success.

Although these challenges are being dealt with individually here, it is important to understand that the directions and activities necessary to address issues often have repercussions for one or more of these critical issues. They are inextricably linked and the approaches

recommended for resolving these issues have been developed recognizing this interrelationship.

The challenges facing the future of Alberta's tourism industry are:

- Tourism as a Government Priority – *"Profile for Action"*
- Tourism and the Environment – *"The Natural Advantage"*
- Tourism Partnerships – *"Tourism is Teamwork"*
- Tourism Awareness – *"Getting to Know Us"*
- Human Resources – *"People, Pride and Passion"*
- Creating a Positive Investment Climate – *"Invest to Grow"*
- Regulations and Regulatory Process – *"Safe and Supportive"*
- Research and Planning – *"Looking Ahead"*
- Tourism Infrastructure – *"Access Alberta"*
- Market Assessment and Marketing – *"Reaching the Customer"*
- Product Development – *"Making the Right Choice"*

In the remainder of this section, each of the challenges is described briefly and framed in terms of a goal statement. The strategic directions set broad overall courses of action which will help achieve the goal. Activities identify specific actions that can be undertaken to support one or more of the strategic directions. The responsibility for implementation of the directions and activities belongs to all tourism shareholders operating in a coordinated and cooperative way.

Tourism as a Government Priority – “Profile For Action”

Governments are major tourism partners in Alberta. They contribute to the supply and operation of tourism products offered, and influence – through legislation, policies, regulations, programs and the allocation of resources – tourism’s ability to operate and flourish. Government efforts have contributed to the great strides made in tourism in Alberta over the past several years. To realize tourism’s full potential, it is critical that a demonstrated commitment to tourism’s priority within governments’ agendas, and, in particular, the provincial government, be secured on an on-going

basis. Several key factors in meeting this challenge include: raising the recognition and profile of tourism as a legitimate player in economic growth; improving cooperation, coordination and delivery of tourism-related programs across government; and providing the necessary government policies and resources to create a healthy climate for tourism to prosper and grow.

Governments are major tourism partners in Alberta.

Goal: To secure a demonstrated commitment to tourism’s priority by all levels of government.

Strategic Directions

- Develop and approve a common tourism policy that applies to all provincial government departments.
- Given tourism’s increasing importance to the Provincial economy, outline a long-term investment strategy of government resources (financial, land, expertise, infrastructure) in the development of the tourism industry.
- Improve coordination in the delivery of government programs to ensure maximum effectiveness to the tourism industry.
- Mobilize the tourism constituency as an on-going lobby group.
- Build effective relationships among municipal, provincial and federal governments to address the tourism-related issues of Alberta.

Activities

- Adopt Tourism 2000 as the provincial government’s tourism policy and initiate implementation of the recommendations outlined in this document.
- Monitor the implementation of Tourism 2000 recommendations through the establishment of an on-going advisory group comprised of a cross-section of tourism stakeholders.
- Continue tourism’s integration with the provincial government’s economic initiative, “Toward 2000 Together”, to ensure the sector’s continued contribution toward economic diversification.
- Ensure all appropriate government committees effectively deal with tourism industry issues.
- Seek the coordination of federal and provincial government tourism policies particularly as they relate to National Parks in Alberta and areas surrounding National Parks in Alberta.

Tourism can be both compatible with the environment and an ally in helping to preserve Alberta's natural resources.

Tourism and the Environment - "The Natural Advantage"

Albertans recognize that the province's natural resources form the basis for many of its tourism products. Albertans are also concerned about environmental integrity. These perspectives require that the tourism industry achieve an integration between use and preservation of the natural assets. Tourism can be both compatible with the environment and an ally in helping to preserve Alberta's natural resources. Constructing this alliance and resolving conflict will require

sound research and information tools and communication and coordination between stakeholders. Tourism can be compatible with environmental objectives, if properly planned and managed.

Goal: To ensure the wise use of Alberta's natural environment as a fundamental resource base of the tourism industry.

Strategic Directions

- Establish tourism as a legitimate user in the allocation and management of the province's natural resources in relation to other resource-based industries such as oil and gas; agriculture; forestry and mining.
- Manage the province's natural resources to ensure an integration of use and protection of these natural assets.
- Establish the validity and value of existing and emerging tourism products and opportunities based on our natural environment. Inform stakeholders and client groups.

Activities

- Identify tourism areas and determine their potential. Recognize that the tourism potential will vary from preservation to development.
- Ensure an integration of the use and preservation of the province's natural assets through such methods as resource evaluation, cost benefit analysis and environmental auditing.
- Complete and implement the Parks System Plan and link this Plan with an overall tourism product development strategy.
- Encourage products such as ecotourism, low-impact accommodation development, and non-consumptive tourism activities to establish a mix appropriate for Alberta.
- Establish effective communication and coordination channels between appropriate stakeholders in determining the best use of our natural assets from a tourism perspective.
- Encourage the participation of all tourism industry operators in Alberta to adhere to the environmental code of ethics adopted by the Tourism Industry Association of Canada and the Tourism Industry Association of Alberta.

Tourism Partnerships – “Tourism is Teamwork”

Tourism, as an industry, is comprised of many stakeholders including: private sector businesses, operations and associations; all levels of governments – federal, provincial and municipal; community and not-for-profit organizations; special interest groups; and the general public. This characteristic of tourism has contributed to the fragmentation of the industry. Tourism also involves a variety of functions. Determining these functions and adopting responsibilities for specific roles by the various stakeholders is a major challenge facing tourism. The key to meeting this challenge is partnership.

The basis of partnerships – committing to mutually beneficial goals, cooperating to pool resources and coordinating activities and actions – is a strategy necessary to compete in the tourism marketplaces of today and tomorrow. The nature of partnerships, their structure and the roles and responsibilities of each partner will vary and change over time, but through the establishment and effective use of partnerships, the industry will “cooperate to compete”.

Goal: To establish a cooperative and effective tourism industry structure.

The basis of partnerships

- committing to mutually beneficial goals,
cooperating to pool resources and
coordinating activities and actions - is a strategy
necessary to compete in the tourism marketplaces
of today and tomorrow.

Strategic Directions

- Identify all tourism stakeholders and outline their roles, responsibilities and jurisdictions.
- Establish regular and on-going communication between stakeholders.
- Establish strategic partnerships to identify and pursue common objectives.
- Monitor and evaluate the implementation of Tourism 2000.

Activities

- Formalize the continuation of an on-going advisory group to assist in communicating with stakeholders and to monitor the implementation of Tourism 2000.
- Strengthen the tourism industry structure in Alberta at all levels from individual operators to regional organizations and provincial associations.
- Broaden the scope of participation and representation within tourism associations.

The key to awareness and improved understanding is education.

Tourism Awareness – “Getting to Know Us”

Tourism affects the daily lives of all Albertans. Although Albertans perceive tourism as a leading growth sector of the provincial economy, a better understanding of its importance, its impact and its contribution to Alberta is required. Existing and prospective support groups from both within and outside the industry must fully understand the business of tourism. Without knowledge of who tourists are, what tourism is and what benefits are derived from tourism, the industry will not receive the wide support that is necessary to reach its full potential.

Several identifiable groups require a heightened awareness of tourism,

including the industry itself, governments, educators, the financial community, the media and Albertans as a whole.

The key to awareness and improved understanding is education. The general public, tourism businesses and operators, and most importantly, Alberta's future generations, need to be better educated in tourism. Both formal education, from early stages to post-secondary levels and broad-based industry and consumer programs are required.

Goal: To ensure that Albertans are aware of and support tourism's contribution to Alberta.

Strategic Directions

- Define the tourism industry and identify its benefits.
- Maintain and develop programs to raise tourism awareness in the following target audiences:
 - industry
 - governments
 - educators
 - media
 - general public.

Activities

- Identify the tourism sectors and quantify their economic and social benefits.
- Continue and strengthen the Alberta Best program.
- Prepare and implement a Provincial Tourism Awareness campaign.
- Participate in and support Western Canadian or Canada-wide initiatives for tourism awareness.
- Utilize Alberta's education system to raise awareness of tourism.
- Monitor and evaluate Albertans' awareness of tourism and attitudes and opinions toward further tourism development.

Human Resources – “People, Pride and Passion”

Tourism is a service and hospitality oriented industry. As such, it relies heavily upon its human resources. How people are greeted and treated will influence the industry's success and ability to be competitive in attracting both new and return visitors. Alberta's tourism industry must continue to strive for excellence in service that meets the expectations of visitors and the industry. Continued efforts in education and training of the

industry's labour force will be key to securing and retaining capable people and enhancing tourism as a professional career choice.

Goal: To develop our human resources to ensure excellence in service that exceeds the expectations of both visitors and industry.

How people are greeted and treated will influence the industry's success and ability to be competitive in attracting both new and return visitors

Strategic Directions

- Provide opportunities for skills development and career advancement in tourism.
- Build respect for tourism as a professional career choice to attract and retain employees.
- Educate and motivate tourism industry owners/operators to offer improved working conditions, wages and benefits as an incentive for employees to stay in the industry.
- Continue to develop and implement programs established for tourism education, training and standards.
- Secure improved and coordinated commitment from other related Government departments to human resource issues affecting tourism.

Activities

- Encourage participation in a strong tourism program in the earlier stages of the provincial school system that educates students on tourism and its various elements.
- Establish a tourism and hospitality training centre.
- Expand the number, type and delivery of Alberta Tourism Education Council job standards and certification processes.
- Encourage tourism industry employers to employ certified staff.
- Forecast industry staffing requirements and cooperate with educational and training institutions in developing these resources.
- Improve career path and skill development opportunities through job exchanges, internship and cooperative placements, secondment and management training programs.
- Develop measurements that can quantify the costs and benefits to the tourism industry associated with certified and trained staff.
- Raise the profile and image of tourism jobs as respected careers by recognition awards.

Resolving capital needs is a major factor in Alberta's tourism industry's continued contribution to income, jobs, export trade and taxation revenues.

Creating a Positive Investment Climate – "Invest to Grow"

Resolving capital needs is a major factor in Alberta's tourism industry's continued contribution to income, jobs, export trade and taxation revenues.

Resolving capital needs is a major factor in Alberta's tourism industry's continued contribution to income, jobs, export trade and taxation revenues. Sufficient capital is required to maintain and upgrade existing product and add new product. Capital needs can be met by debt and equity. Equity can originate from the retention and reinvestment of industry profits or the attraction of new money locally or abroad. Debt can be raised by instruments such as bonds, guarantees, mortgages or debentures through individuals and commercial private or public sector lending institutions. Taxes collected by government from the tourism industry could also be directed in support of industry needs.

Determining the amount of capital required is only one aspect of this challenge. Many different players can

assume various roles in addressing the capital needs of the industry depending on the nature of the capital need. Sorting out the appropriate role for governments in a market-driven industry is key to this challenge.

Alberta's ability to attract investment also depends on the competitiveness of the industry. There is an increasing concern that Alberta may have lost some of its comparative advantages of previous years. The cumulative impact of taxation such as GST, hotel tax and the transportation fuel tax reduces the competitiveness of Alberta's tourism sector and its subsequent attractiveness as an investment opportunity.

Goal: To create an investment climate which stimulates financing for viable tourism opportunities.

Strategic Directions

- Encourage the private sector to seek its own financing.
- Ensure any government financial involvement in the industry does not unfairly intrude on the natural state of the marketplace.
- Accept foreign investment as a legitimate source of industry financing.
- Address key competitiveness issues which can improve the attractiveness of Alberta's tourism industry as an investment opportunity.

Activities

- Quantify the financial and investment needs of the industry necessary to achieve its goals by the year 2000.
- Identify sources of financing and investment to meet the funding needs of the industry.
- Develop vehicles to assist industry in improving business and management skills.
- Examine the impact of the hotel tax and transportation fuel tax on the competitiveness of Alberta's tourism sector.
- Investigate the direct allocation of taxation revenue derived from Alberta's tourism industry to identified needs of the industry.
- Examine local development bonds (ie. Saskatchewan and Manitoba) and industrial bonds (ie. United States) as potential financing tools.

Regulations and Regulatory Process – “Safe and Supportive”

As with all industries, the tourism industry is subject to regulations and regulatory processes that have been established to protect society and its values. Both the overall regulatory climate and specific regulations can inhibit or enhance the ability of tourism stakeholders to meet their own agendas. For example, Alberta's safe, secure and stable society is a positive tourism attribute, maintained through the establishment and enforcement of rules and regulations. Other regulations may inhibit tourism growth. Of particular importance are some land use regulatory processes that can affect the industry's ability to provide new and upgraded

tourism products. Establishing processes that are acceptable to all tourism stakeholders, and economic, environmental and social needs are critical to attracting investment. Effective processes are required to resolve such issues at both province-wide and site-specific levels. These processes must be clearly laid out and understood ahead of time and must be consistently applied.

Goal: To ensure regulatory mechanisms work positively to support a healthy tourism industry.

Establishing processes that are acceptable to all tourism stakeholders, and economic, environmental and social needs are critical to attracting investment.

Strategic Directions

- Establish a regulatory climate that has the confidence of all users.
- Ensure that government legislation, policies and regulations encourage, rather than discourage, the success of the tourism industry.

Activities

- Identify regulatory factors inhibiting tourism and tourism development.
- Work with regulatory agencies to reduce inhibiting regulations.
- Encourage industry to be self-regulatory whenever possible.
- Establish criteria for land use decisions at appropriate levels agreed to by all stakeholders.
- Ensure that regulatory processes are based on clearly defined steps and information required, finite timelines, and reasonable costs relative to scale of development.
- Consider the implementation of a trust fund to assist the tourism industry in meeting the costs of the regulatory process; in particular, those costs associated with an environmental review.

Research and Planning – “Looking Ahead”

The future development of Alberta's tourism industry will depend on making informed choices.

The future development of Alberta's tourism industry will depend on making informed choices. These decisions will increasingly depend on collecting, compiling and analyzing sound market and product information. Tourism is a global, dynamic and evolving industry. Alberta's tourism competitors are using increasingly sophisticated research and planning tools to identify and serve markets. The tourism industry in Alberta cannot rely on traditional methods and the assurance that our markets will always return or view our products favourably. Clients

demand diverse, sophisticated or unique products which require effective forecasting, market profiling and product planning. Research provides the foundation on which planning programs can be designed and translated into action. Tourism stakeholders must find a way to complete the research and undertake the planning required to stay competitive.

Goal: To provide sound information and effective planning processes as a guide to decision-making in the tourism industry.

Strategic Directions

- Identify and implement research required to support the strategic directions of Tourism 2000.
- Identify the appropriate levels of research and planning required and ensure that the planning resources and mechanisms are available to facilitate tourism development.
- Ensure stakeholders participate in the planning process.
- Establish tourism as a legitimate player in the land use planning processes of Alberta.

Activities

- Continue to ensure that Alberta communities participate in tourism planning, the identification of assets and actions to use those assets.
- Where appropriate, develop Regional Tourism Action Plans and identify actions to develop products based on those plans.
- Prepare a provincial tourism plan that integrates the strategic directions outlined within this document and the strategic directions from the Toward 2000 Together initiative.
- Evaluate tools and implement a program that will illustrate a cost-benefit comparative analysis of using land resources for tourism in comparison to alternate resource uses.
- Refine tools for analyzing information and distributing the results to the appropriate audiences.
- Seek commitment from industry stakeholders to participate in and support major research and forecasting vehicles required during the short-, medium- and long-term periods to the year 2000 such as: Alberta Non-Resident Travel Exit Survey; Alberta Resident Travel Survey; and Tourism Impact Monitoring System. Use this information for industry development.

Tourism Infrastructure – “Access Alberta”

Tourism infrastructure refers to facilities and services that directly support the development of the province's tourism resources. These can include roads, other transportation modes such as air and rail, utility services, communication and information needs, as well as tourism attractions such as museums, heritage sites, parks and interpretive centres. Infrastructure can also refer to services such as health, education and safety and security measures that indirectly satisfy the needs of travellers and help tourism flourish.

Infrastructure is critical in attracting and maintaining visitation. Information and accessibility are key factors in the destination decision and Alberta's infrastructure must continue to meet visitor needs.

Two aspects of infrastructure development pose difficult challenges. First, tourism infrastructure such as roads and attractions are powerful tools for regional economic development. They can

generate tourism traffic and provide incentives to foster the development of other local or regional opportunities. The allocation of resources for infrastructure must support the development of viable regional tourism opportunities. Such an allocation must take into account considered and fair access to the resources available. Secondly, the issue of who pays the capital and operating costs associated with major infrastructure developments must be addressed. All developments require a careful cost/benefit evaluation. The requirement for self-sufficiency and a high level of commitment from stakeholders and users is increasing, although infrastructure developments may in some instances be largely supportable by benefits generated other than for tourism alone.

Infrastructure is critical in attracting and maintaining visitation.

Goal: To use infrastructure to stimulate and support the further development of Alberta's tourism industry.

Strategic Direction

- Invest in infrastructure required to support market driven development where a timely return on investment to government can be demonstrated.

Activities

- Recognize and incorporate tourism needs in major provincial infrastructure development.
- Determine tourism infrastructure priorities based on a product development strategy.
- Assess the return on investment generated by tourism infrastructure.
- Ensure provincial transportation policy and infrastructure developments recognize and incorporate tourism needs by contributing to:
 - improved access to the province from major tourist markets
 - facilitating the movement of tourists within the province.
- Ensure information required by visitors is provided through adequate signage and access to information.
- Assess and prioritize potential regional tourism opportunities for market viability, self-sufficiency and local support.

Success in tourism requires a strong appreciation of the customers' wants and needs.

Market Assessment and Marketing – “Reaching the Customer”

Success in tourism requires a strong appreciation of the customers' wants and needs. There are two key aspects to the marketing challenge:

- i) market assessment – determining current and emerging target markets by identifying their attributes and profiling them against Alberta's current and emerging tourism product offerings, and;
- ii) marketing and promotion – developing strategies, identifying activities and allocating roles and responsibilities among stakeholders for marketing initiatives within the context of the market assessment.

In Alberta, the marketing challenge needs to address: the allocation of resources between various target markets; the development of stronger links or networks between the province's traditional established attractions and other viable emerging regional and local assets; and the development of an integrated marketing approach among all stakeholders to access existing and emerging markets.

Goal: To identify Alberta's target markets and to develop marketing strategies to improve our competitive position within those markets.

Strategic Directions

- Endorse the implementation of the *Strategic Marketing Plan for Tourism in Alberta 1991-1996* (see Appendix C).
- Develop marketing linkages between major traditional tourism areas and attractions and regional tourism resource/opportunities to meet the emerging needs of the marketplace.
- Develop consistency in messages and images to stimulate travel from target markets.

Activities

- Initiate the strategic focus, objectives, marketing tactics and roles outlined in the *Strategic Marketing Plan for Tourism in Alberta 1991-1996* aimed at long-haul developing markets, long-haul touring markets, destination markets, adventure/outdoor markets, ski markets, meetings markets, in-Alberta and regional close-in markets, and long-haul emerging markets.
- Develop vehicles for cooperative marketing, in particular continue the Team Tourism initiative.
- Ensure joint marketing initiatives supported by cooperative programs are complementary.
- Monitor and evaluate cooperative marketing efforts against the goals of the *Strategic Marketing Plan for Tourism in Alberta 1991-1996*.

Product Development – “Making the Right Choice”

Making effective choices that match products and market needs to our resources will significantly contribute to a strong and competitive industry. The tourism industry in Alberta has the ability, the tourism assets and resource base on which to develop a diversity of products. Existing products already provide an excellent foundation for growth. Creating the right product mix for our resident and non-resident markets on an

Alberta-wide basis will optimize tourism benefits to the province. This will require a sound understanding of our tourism strengths and assets, as well as coordinated development of products to meet evolving market needs.

Goal: To enhance the number and type of tourism experiences available based on Alberta's assets and evolving market needs.

Alberta has the ability, the tourism assets and resource base on which to develop a diversity of products.

Strategic Directions

- Develop products to attract the national and international markets and focus such development on our strengths and assets.
- Broaden Alberta's product base by developing viable regional tourism assets.
- Develop linkages between international/national tourism products and regional tourism products.

Activities

- Prepare a provincial tourism product development strategy that will identify priority tourism development areas.
 - Identify development objectives for priority areas.
 - Ensure that natural and physical resources remain available in these areas.
 - Measure development objectives against critical guiding principles, such as:
 - self-sufficiency
 - seasonality
 - market responsiveness
 - local commitment and support.
- Assess and determine markets based on tourism resources and assets.
- Determine development capacity and the industry structure necessary to deliver this capacity.
- Encourage and direct development geared to meet identified opportunities such as major events, ecotourism, cultural and heritage sites, and native tourism products.
- Ensure that viable tourism opportunities throughout the province have fair access to available resources.
- Continue funding of the Community Tourism Action Program and convert it to a regionally-based development program to encourage the linking and packaging of regional assets on a cooperative basis.
- Increase length of stay and dispersion of visitors throughout the province through cooperative programming such as touring routes, improved information dissemination and signage.

V. ROLES AND RESPONSIBILITIES

The task now remains for all participants in tourism in Alberta to adopt appropriate roles and responsibilities in seeing that the strategic directions are implemented.

One overwhelming characteristic of Alberta's tourism experience is the diversity of participants involved. Not only do a wide range of individuals and entities combine to comprise tourism in Alberta, each may relate to tourism in specific instances differently at different times. On the whole, however, a strong underlying confidence and common belief in the ultimate potential benefits of tourism in Alberta was evident throughout Tourism 2000. It was this acceptance and common ground that allowed the goals and strategic directions to be set. The task now remains for all participants in tourism in Alberta to adopt appropriate roles and responsibilities in seeing that the strategic directions are implemented.

The range of tourism stakeholders in Alberta is extensive. Stakeholders include individual Albertans, various organized groups and corporate entities as well as governments and their related departments, boards and agencies. This characteristic of tourism in Alberta is commonly referred to as fragmentation. Any attempt at categorizing the major stakeholders only serves to highlight the fragmentary nature of tourism in Alberta. For example, a grouping of industry operators will still vary substantially by size, location and sophistication of operations. A grouping of attractions may vary from profit-motivated corporate entities to not-for-profit societies to government facilities. Even a grouping of industry sector associations can vary by the degree of direct involvement in tourism.

The fragmentation of tourism within and among stakeholder groups was certainly evident in the views and perspectives expressed to the Panel during the Tourism 2000 process. For many of the discussion topics, divergent opinions, different interpretations and conflicting

approaches were frequently stated. Governments were questioned by business, special interest groups and the public about duplication and inefficiencies, lack of coordination and communication, unwarranted intrusion into the marketplace and failure to translate a stated priority for tourism into effective actions. Differences were voiced between developers and environmentalists over specific development proposals. Positions calling for the concentration of marketing efforts on in-province local and regional markets were made just as forcefully for out-of-province international markets. Emerging tourism destinations emphasized their potential as opposed to existing established tourism destinations. Many diverse points and positions were presented to the Panel. They represent some truly important issues which require some hard choices, particularly in a time of recession and limited resources.

Despite the varying positions, the most overriding theme arising from Tourism 2000 is the belief shared by all the stakeholders that tourism is a viable force for economic, social and environmental development in the Province of Alberta. The fragmented nature of tourism is not a weakness but a strength in that it provides a broad base of support. This commitment to tourism as an integral element of Alberta's development overrides the diversity of views held by those who care about tourism, Alberta's economic and natural resources, and the people of this province.

The Panel considers the support for tourism's existing and potential contribution to Alberta and Albertans as real and enduring. It is based on several fundamental principles broadly held by all stakeholders. Principles such as partnership, environmental integrity,

sustainability, fiscal responsibility and equality of opportunity, consistently underlie the challenges and strategic directions which have emerged from the Tourism 2000 initiative. These principles drive all tourism stakeholders to uphold the strategic directions they have identified through the Tourism Advisory Panel and compel, as well as assist, all tourism stakeholders in assuming the appropriate roles and responsibilities in implementing the strategic directions and achieving the vision for tourism in Alberta in the year 2000.

There is considerable challenge in determining the exact roles and responsibilities for the broad spectrum of tourism stakeholders. The responsibility for all the strategic directions and actions cannot be assumed by any one stakeholder alone. One stakeholder also cannot continually assume all the roles necessary to implement all the strategic directions and actions. The degree of responsibility and the roles adopted by the various tourism stakeholders will vary over time as challenges are addressed and priorities shift. Each of the tourism stakeholders will take on, individually and collectively, various roles in relation to the degree of responsibility adopted. It is the willingness of the stakeholders to assume their responsibility for specific strategic directions and to play their most appropriate role that will determine tourism's success in meeting its challenges. While the Tourism 2000 process often witnessed many opinions regarding the allocation of responsibilities and roles, there was general consensus about the challenges facing tourism. Stakeholders also exhibit an overriding desire to accept responsibility for implementing the strategic directions. All stakeholders are committed to the role of partnership.

The broad acceptance of the role of partner provides a strong base from

which tourism stakeholders in Alberta can bridge the fragmented nature of their relationships and work towards their common belief in tourism in Alberta. Each strategic direction can benefit from the expressed willingness of all stakeholders to commit to a role of partner. Depending on the nature of the strategic direction, some stakeholders will become more active partners than others. Roles within the partnership can also vary at the various stages of implementing each strategic direction. In some instances, a partner will play the role of leader in implementing a strategic direction. In other cases, a partner will accept the role of a supporter or facilitator among the other partners. Other partners' roles will vary from motivating and stimulating to fostering or endorsing.

During the Tourism 2000 process, the allocation and acceptance of specific responsibilities and precise roles were not clear, however, the overwhelming commitment to teamwork was apparent and some general directions regarding roles and responsibilities of the tourism partners did emerge. Combined, this willingness to work together and to recognize roles and responsibilities provides the foundation for a framework of participation, leadership and opportunity for the range of tourism partners.

Within this framework, each of the major challenges and strategic directions addressed in the preceding chapter requires a level of participation by some, or all, of the various tourism partners. From this framework, partners will be able to assess the general allocation of roles and recognize their own responsibilities, taking into account their specific needs, resources available and the fact that the degree of responsibility and nature of their role can change over time and challenge by challenge.

Stakeholders exhibit an overriding desire to accept responsibility for implementing the strategic directions. All stakeholders are committed to the role of partnership.

Tourism as a Government Priority – “Profile for Action”

To realize its full potential, tourism must be recognized as a legitimate player in Alberta's economy...

Establishing the validity and value of tourism products based on our natural environment and communicating this information is the joint responsibility of the Provincial government, Alberta Economic Development and Tourism, industry operators and environmental special interest groups.

To realize its full potential, tourism must be recognized as a legitimate player in Alberta's economy and gain a higher priority on the provincial government's agenda. Given its tourism mandate, the Department of Economic Development and Tourism must take the primary role of positioning tourism within the government as a whole. By working with other government departments, agencies and related committees, the Department, through Tourism 2000, can continue the lead role of developing and approving a common tourism policy that applies to all provincial government departments; outline a long-term investment strategy of government resources (financial, land, expertise, infrastructure) in the development of the tourism industry; and improve coordination in the delivery of government programs to ensure maximum effectiveness to the tourism industry.

Private industry and industry associations should continue to take the lead in lobbying government and building a case for tourism, mobilizing the tourism constituency as an ongoing lobby group, and generating political support. Tourism can only achieve the required commitment from governments by building linkages among the three levels of government. Responsibility must be jointly shared to build effective relationships among municipal, provincial and federal governments to address the tourism-related issues of Alberta.

Tourism and the Environment – “The Natural Advantage”

The primary responsibilities for managing Alberta's natural resources lies with the Provincial and Federal Governments. Including tourism in the management of these resources is a role that must be shared by specific tourism partners.

Responsibility lies jointly with the provincial government, Alberta Economic Development and Tourism, The Tourism Industry Association of Alberta (TIAALTA) and the industry operators, associations and developers.

The primary responsibility for managing the province's natural resources to ensure an integration of use and protection of these assets lies with the Provincial government. Within government, the lead in establishing tourism as a legitimate user in the allocation and management of these natural resources falls to Alberta Economic Development and Tourism. Establishing the validity and value of tourism products based on our natural environment and communicating this information is the joint responsibility of the Provincial government, Alberta Economic Development and Tourism, industry operators and environmental special interest groups.

Tourism Partnerships – “Tourism is Teamwork”

One of the major challenges holding back the growth of the tourism industry is its diverse nature. This has, at times, created a perceived lack of coordination, cooperation and communication. In recent years, the many excellent initiatives which have been undertaken along with **Tourism 2000: A Vision for the Future** have clearly illustrated a willingness to work together.

To increase coordination throughout the industry, a tourism structure based on principles of partnership, cooperation and mutually-beneficial alliances is required. Alberta Economic Development and Tourism and TIAALTA must continue to work together to identify all tourism stakeholders; outlining their roles, responsibilities and jurisdictions and establishing regular and ongoing communication between them. TIAALTA

and Alberta Economic Development and Tourism must also take responsibility to monitor and evaluate the implementation of Tourism 2000.

All partners must take it upon themselves to establish strategic alliances that will allow them to identify and pursue common objectives to the benefit of the individual partners and the tourism industry as a whole. Only through joint participation and commitment to common objectives can effective partnerships be created and sustained.

Tourism Awareness – “Getting to Know Us”

Although tourism's profile has increased significantly in recent years, due in part to a number of cooperative programs and projects between private sector and government, awareness continues to require attention. We all have a share in promoting Alberta and the tourism industry. The private sector and government each have significant roles to play. The Provincial government, specifically Alberta Economic Development and Tourism, must lead in defining the industry and identifying its benefits. Representative industry organizations and associations must take the lead in maintaining and developing programs designed to raise tourism awareness in key audiences such as the industry itself, governments, educators, media and the general public.

Human Resources – “People, Pride and Passion”

Human resources and services are the backbone of the tourism industry. The work of the Alberta Tourism Education Council (ATEC), a joint initiative of private sector industry and government, has been very effective to date. Primary responsibility for strategic directions related to education; training and standards; skills development; and career choice and advancement in tourism

should lie with the ATEC partnership. ATEC should continue to take a strong lead role in developing and implementing programs associated with these directions. ATEC should also secure a commitment from governments to human resource issues impacting tourism.

Creating a Positive Investment Climate – “Invest to Grow”

Development of tourism in Alberta relies heavily on a positive investment climate. All partners can contribute to creating this climate. Representative industry associations, along with governments, are in a good position to lead the actual quantification of tourism's financing and investment needs. Private industry can be proactive in nurturing its own financing needs. Financial needs of the industry can also be nurtured by industry associations and governments identifying sources of funds and encouraging the improvement of management and business skills. Government has a major role to play in ensuring that any financial involvement of its various departments, boards and agencies does not unfairly intrude on the natural state of the marketplace. Government also has a lead role along with private industry in accepting foreign investment as a legitimate source of financing.

Regulations and Regulatory Process – “Safe And Supportive”

All three levels of government – national, provincial and municipal – must be prepared to respond to the regulatory needs of the tourism industry by establishing a regulatory climate that has the confidence of all users. Such a climate must include a need for: strong local involvement; a broad-based integrated approach; a clear jurisdiction and a well-defined process with authority to make the decisions; reasonable process costs; and proper response time.

...awareness continues to require attention.

We all have a share in promoting Alberta and the tourism industry.

Human resources and services are the backbone of the tourism industry.

Development of tourism in Alberta relies heavily on a positive investment climate. All partners can contribute to creating this climate.

Tourism is a proactive industry that uses information as a tool for guiding its present and future activities.

The marketing challenge best represents the need for partnership among all Alberta's tourism stakeholders.

Ensuring that regulatory mechanisms work positively to support tourism requires reciprocal responsibility. Private sector operators, affected industry sectors and associations, and governments must ensure that legislation, policies and regulations recognize and encourage the success of the tourism industry.

Research and Planning - "Looking Ahead"

Tourism is a proactive industry that uses information as a tool for guiding its present and future activities. Gathering, analyzing and translating information into decisions and actions often requires more resources than any single operator or segment of the industry can afford. To ensure that the necessary information is collected and shared, Alberta Economic Development and Tourism should take the lead role for research that has industry-wide relevance. This responsibility extends to the research activities required to support Tourism 2000. These activities will be supplemented by the industry partners in terms of their participation in defining the research, sharing research costs and acquiring and using the results.

The responsibility for establishing tourism as a legitimate player in the land use planning process of Alberta jointly falls to the Provincial government in conjunction with the appropriate approval authorities. To help accomplish this, the Provincial government and the approval authorities will jointly identify the appropriate levels of planning required and ensure that the planning resources and mechanisms are available to facilitate tourism development. These partners should also ensure that other affected tourism partners are given the opportunity to participate in the planning process. Industry associations, developers and operators will need to accept responsibility for participating in planning processes where direct impact and relevance is evident.

Tourism Infrastructure - "Access Alberta"

The provision of infrastructure is a far reaching responsibility that is usually undertaken to provide positive benefits to the general public. In providing infrastructure for the tourism sector, two partners will be responsible for such development. The Alberta government's role may be largely determined by a whole range of benefits that can be derived by tourism, other economic sectors and the general public through such infrastructural investment. Non-government sectors may find an increasing involvement in infrastructure cost in order to have projects implemented. These partners must be prepared to contribute to the development of infrastructure in order to prove a commitment to their individual development.

In some cases, the Alberta government may consider undertaking a cost-shared position on some off-site services related to an individual tourism project if a timely return on investment in these services is proven and provided by the industry developer.

Market Assessment and Marketing - "Reaching the Customer"

The marketing challenge best represents the need for partnership among all Alberta's tourism stakeholders. All stakeholders need to play a role in developing product linkages; creating and sustaining appropriately targeted messages and images; implementing the *Strategic Marketing Plan for Tourism in Alberta 1991-1996*; developing vehicles for cooperative marketing; and maintaining Team Tourism.

Product Development - "Making the Right Choice"

Product development involves developing assets and resources into

attractions and experiences. Primary responsibility for development of facilities and services lies with the private sector. The private sector will take the responsibility for developing products to attract the national and international market and should focus their development on the province's strengths and assets. Broadening Alberta's product

base by developing viable regional tourism assets and linking the international/national level tourism products with the regional tourism products is a shared responsibility between the Provincial government, Alberta Economic Development and Tourism, the private sector, local approval authorities and not-for-profit groups.

VI. CONCLUSION

Tourism 2000 has identified several other directions which must be pursued to broaden tourism's ability to grow and compete.

Continued implementation of this strategy requires a strong communication vehicle which will ensure all partners continue to move in the same overall direction.

Tourism 2000 identifies the major challenges facing tourism in Alberta to the year 2000. It also establishes goals for tourism in Alberta in the year 2000 and sets some strategic directions and actions for achieving the goals. Many of the goals and strategic directions identified reinforce basic initiatives previously laid out in the *1985 Position and Policy Statement on Tourism* and the *1989 Eight Point Strategy*. Many of these initiatives continue to be widely identified and supported by the majority of stakeholders. The most significant include:

- enhancing community and regional tourism development and marketing;
- strengthening the service and hospitality aspects of the industry;
- continued attention to tourism awareness and the educational and training needs of the industry;
- more integrated and cooperative marketing efforts;
- improvement of access, transportation linkages and infrastructure support; and
- developing and sustaining the economic, social and political climate necessary to realize the potential of the tourism industry in Alberta.

Tourism 2000 has confirmed these initiatives. They have been successful to date and should continue. In addition, Tourism 2000 has identified several other directions which must be pursued to broaden tourism's ability to grow and compete. Some of these directions represent a refinement of present strategies and provide more support to key areas; others will require a change in the way we assess new challenges and the allocation of resources to meet these challenges.

Some of these "new" directions include:

- establishing a cooperative and effective tourism structure to integrate all facets of the industry and to reduce fragmentation, duplication and inefficiencies;
- creating a positive investment climate which stimulates financing for viable tourism opportunities;
- ensuring that regulatory mechanisms work positively to support a healthy tourism industry;
- ensuring that Alberta's natural environment is recognized as a fundamental tourism resource and that the tourism industry achieve integration between use and preservation of the natural assets;
- providing sound information and an effective, consultative planning process to guide decision-making;
- implementing a land use system which recognizes and supports the importance of tourism and the industry's unique requirements for a broad range of land uses; and
- assessing regional tourism development on the basis of product development, market ability and cost effectiveness (self-sufficiency).

Tourism 2000 also identifies the need for a framework to guide the continuation of past initiatives and new strategic directions. The broad framework outlined in Section V begins the task of achieving the vision for tourism by linking the strategy and the resources required to carry it out. The matching and fitting together of these elements is an ongoing process. Continued implementation of this strategy requires a strong communication vehicle which will ensure all partners continue to move in the same overall direction. All partners will need to be apprised of shifting priorities

in challenges and the consequent impact on their roles and responsibilities. Progress must be monitored and evaluated to determine shifts in priorities and further decide on responsibilities and roles. These communication, monitoring and evaluation needs will require an Advisory Group mandated by all partners to guide tourism in Alberta in accordance with goals and strategic directions outlined in **Tourism 2000: A Vision for the Future**.

Tourism has an important role in helping Albertans achieve a strong economy, a

healthy environment and an unsurpassed quality of life. It is an integral part of Alberta and has the potential to significantly increase its contribution to the economic, social and environmental well-being of Albertans. By capitalizing on values we hold strongly, Albertans will be able to strengthen the commitment and cooperation necessary to meet challenges facing the industry. Tourism will continue to grow, enhancing its viability and its future contribution to Alberta to the year 2000 and beyond.

Tourism has an important role in helping Albertans achieve a strong economy, a healthy environment and an unsurpassed quality of life.

APPENDIX A

Eight Point Strategy

1. Solid Tourism Foundation at the Community Level
2. Solid Service Structure for the Industry
3. Regional and Provincial Tourism Generators
4. Major Destination Resorts Developed by the Private Sector
5. Appropriate Infrastructure and Transportation Access
6. Education and Training Needs of the Industry
7. Integrated Approach to Marketing
8. Review all Government Policies Affecting Tourism

APPENDIX B

Tourism Forecast of Person Trips and Expenditures

1991-2000

Introduction

The key assumptions on which these scenarios were developed detail estimated increases in visitor trips to and within Alberta from simple and broadly defined geographic markets and the projected expenditure growth by these visitors. A forecasted rate of inflation, on an annual basis, was also taken into account.

Note: Forecast of person-trips and expenditures are for overnight trips only and does not include same-day travel.

Tourism Forecast of Person-Trips and Expenditures

1991 - 2000 - Scenario 1

Year	Person-Trips				
	Overseas	United States	Other Canada	Alberta	Grand Total
1991	466,600	818,600	2,309,200	12,565,800	16,160,200
1992	499,300	830,900	2,263,000	12,314,500	15,907,700
1993	524,300	847,500	2,285,600	12,437,600	16,095,000
1994	542,651	860,213	2,302,742	12,561,976	16,267,581
1995	561,643	873,116	2,320,013	12,687,596	16,442,367
1996	581,301	886,212	2,337,413	12,814,472	16,619,398
1997	601,646	899,506	2,345,943	12,942,616	16,798,712
1998	622,704	912,998	2,372,605	13,072,043	16,980,350
1999	644,499	926,693	2,390,400	13,202,763	17,164,355
2000	667,056	940,594	2,408,328	13,334,791	17,350,768
Average Annual Compound Growth (1993 - 2000)	3.50%	1.50%	0.75%	1.00%	1.08%

Average Expenditure per Person

Year	Overseas	United States	Other Canada	Alberta	CPI (% change)
1991	\$ 660.25	\$ 381.85	\$ 315.95	\$ 121.86	—
1992	670.76	387.95	321.01	123.81	1.60%
1993	690.84	399.60	330.64	127.52	3.00%
1994	711.56	411.59	340.56	131.35	2.90%
1995	732.20	423.53	350.44	135.16	2.80%
1996	752.70	435.38	360.25	138.94	2.60%
1997	772.27	446.70	369.62	142.56	2.30%
1998	790.03	456.98	378.12	145.84	1.90%
1999	805.04	465.66	385.30	148.61	1.50%
2000	817.12	472.65	391.08	150.84	1.30%

<i>Total Expenditures</i>					
Year	Overseas	United States	Other Canada	Alberta	Grand Total
1991	\$ 308,072,300	\$ 312,585,900	\$ 729,593,900	\$ 1,531,275,000	\$ 2,881,527,100
1992	334,911,600	322,351,100	726,442,000	1,524,659,900	2,908,364,600
1993	362,206,900	338,662,000	755,717,600	1,586,103,700	3,042,690,200
1994	386,130,666	354,054,188	784,227,046	1,650,023,679	3,174,435,579
1995	411,234,951	369,786,586	813,021,903	1,714,853,109	3,308,896,549
1996	437,545,763	385,842,719	842,054,915	1,780,497,686	3,445,941,084
1997	464,634,221	401,812,749	870,427,956	1,845,058,533	3,581,933,459
1998	491,957,037	417,220,259	897,126,157	1,906,369,828	3,712,673,281
1999	518,849,868	431,524,656	921,027,841	1,962,016,763	3,833,419,128
2000	545,064,758	444,567,489	941,854,583	2,011,361,484	3,942,848,314

Note: The estimated annual growth in person-trips between 1993 and 2000 is shown for each of the four visitor origins and for total person-trips; growth is compounded annually. Total expenditures are calculated by multiplying the number of person-trips from each visitor origin by the corresponding average expenditure per visitor. The average expenditure is adjusted each year by the amount shown under the heading "CPI (% Change)". These percentages are the estimated annual increase in the Consumer Price Index (CPI) for Alberta.

Tourism Forecast Of Person-Trips and Expenditures 1991 To 2000 – Scenario 2

<i>Person-Trips</i>					
Year	Overseas	United States	Other Canada	Alberta	Grand Total
1991	466,600	818,600	2,309,200	12,565,800	16,160,200
1992	499,300	830,900	2,263,000	12,314,500	15,907,700
1993	524,300	847,500	2,285,600	12,437,600	16,095,000
1994	550,515	872,925	2,331,312	12,686,352	16,441,104
1995	578,041	899,113	2,377,938	12,940,079	16,795,171
1996	606,943	926,086	2,425,497	13,198,881	17,157,407
1997	637,290	953,869	2,474,007	13,462,858	17,528,024
1998	669,154	982,485	2,523,487	13,732,115	17,907,242
1999	702,612	1,011,959	2,573,957	14,006,758	18,295,286
2000	737,743	1,042,318	2,625,436	14,286,893	18,692,390

Average Annual Compound Growth (1993 – 2000) 5.00% 3.00% 2.00% 2.00% 2.16%

<i>Average Expenditure per Person</i>					
Year	Overseas	United States	Other Canada	Alberta	CPI (% Change)
1991	\$ 660.25	\$ 381.85	\$ 315.95	\$ 121.86	—
1992	670.76	387.95	321.01	123.81	1.60%
1993	690.84	399.60	330.64	127.52	3.00%
1994	711.56	411.59	340.56	131.35	2.90%
1995	732.20	423.53	350.44	135.16	3.00%
1996	754.17	436.23	360.95	139.21	2.80%
1997	775.28	448.45	371.06	143.11	2.50%
1998	794.66	459.66	380.33	146.69	2.70%
1999	816.12	472.07	390.60	150.65	2.30%
2000	834.89	482.92	399.59	154.12	2.10%

Year	Total Expenditures					Grand Total
	Overseas	United States	Other Canada	Alberta		
1991	\$ 308,072,300	\$ 312,585,900	\$ 729,593,900	\$ 1,531,275,000	\$ 2,881,527,100	
1992	334,911,600	322,351,100	726,442,000	1,524,659,900	2,908,364,600	
1993	362,206,900	338,662,000	755,717,600	1,586,103,700	3,042,690,200	
1994	391,726,762	359,286,516	793,956,911	1,666,360,547	3,211,330,736	
1995	423,241,180	380,797,000	833,321,294	1,748,978,703	3,386,338,177	
1996	457,735,337	403,987,537	875,487,352	1,837,477,026	3,574,687,251	
1997	494,079,522	427,758,163	918,001,017	1,926,704,910	3,766,543,613	
1998	531,753,086	451,605,681	959,770,064	2,014,369,983	3,957,498,814	
1999	573,415,940	477,713,005	1,005,397,533	2,110,133,132	4,166,659,611	
2000	615,934,732	503,361,417	1,049,092,109	2,201,839,518	4,370,227,776	

Note: The estimated annual growth in person-trips between 1993 and 2000 is shown for each of the four visitor origins and for total person-trips; growth is compounded annually. Total expenditures are calculated by multiplying the number of person-trips from each visitor origin by the corresponding average expenditure per visitor. The average expenditure is adjusted each year by the amount shown under the heading "CPI (% Change)". These percentages are the estimated annual increase in the Consumer Price Index (CPI) for Alberta.

APPENDIX C

Strategic Marketing Plan for Tourism in Alberta

1991-1996

Strategic Thrusts

The tourism marketing goal for Alberta will be achieved through these key strategic thrusts:

- creating a strong image of Alberta
- emphasizing sales in addition to generic awareness, and creating a sense of urgency in promotional communications
- providing accessible, combination packages to increase length of stay and revenue in key destination areas
- the development of cooperative packages including attractions, tours, events, and services within and around travellers' core destinations
- spreading the tourism demand across more of the province and through more of the year

- marketing shoulder season and off-peak travel opportunities
- encouraging in-Alberta and regional close-in markets to experience the variety offered in all areas of the province, many of which are underutilized
- presenting cities and resorts as safe, attractive, anchor destinations that offer a broad range of experiences
- working to increase the accessibility and affordability of flights into the province
- accelerated product development in the province's highest-demand area
- developing an organized and systematic tracking system to measure sales and monitor performance.

APPENDIX D

Tourism 2000: A Vision for the Future

Advisory Panel

The Advisory Panel was comprised of the following membership.

Co-Chairs

Mr. Brian Evans
MLA, Banff-Cochrane Constituency
Canmore, Alberta

Mr. Joe Couture
President
Tourism Industry Association of Alberta
Jasper, Alberta

Advisory Panel Members

Dr. Ted Chambers
Professor
Faculty of Business
University of Alberta
Edmonton, Alberta

Mr. Denis Cole
Former Vice Chairman, Finance
Committee
Alberta Planning Board
Calgary, Alberta

Mr. Strater Crowfoot
Chief
Blackfoot Band
Tribal Administration
Gleichen, Alberta

Mr. David Kitchen
Senior Vice President and
General Manager, Alberta
Royal Bank of Canada
Calgary, Alberta

Mr. Michael Procter
Mayor
Town of Peace River
Peace River, Alberta

Mr. Greg Royer
Chief Operating Officer
Relax Inns
Calgary, Alberta

Mr. Brian Staszenski
Executive Director
Environmental Resource Centre
of Edmonton
Edmonton, Alberta

Ms. Gail Surkan
Mayor
City of Red Deer
Red Deer, Alberta

Mr. Ted Kissane
Vice President and General Manager
Banff Springs
Banff, Alberta
(to January 1992)

Mr. Sid Fattedad
Vice President
Canadian Airlines International
Vancouver, British Columbia
(to January 1992)

For further information and copies of material related to
Tourism 2000: A Vision For the Future you may contact.

Alberta Economic Development and Tourism
6th Floor, City Centre Building
10155 - 102 Street
Edmonton, Alberta T5J 4L6
Phone: (403) 427-4322
Fax: (403) 427-1527

N.L.C./B.N.C.



3 3286 50158 7410